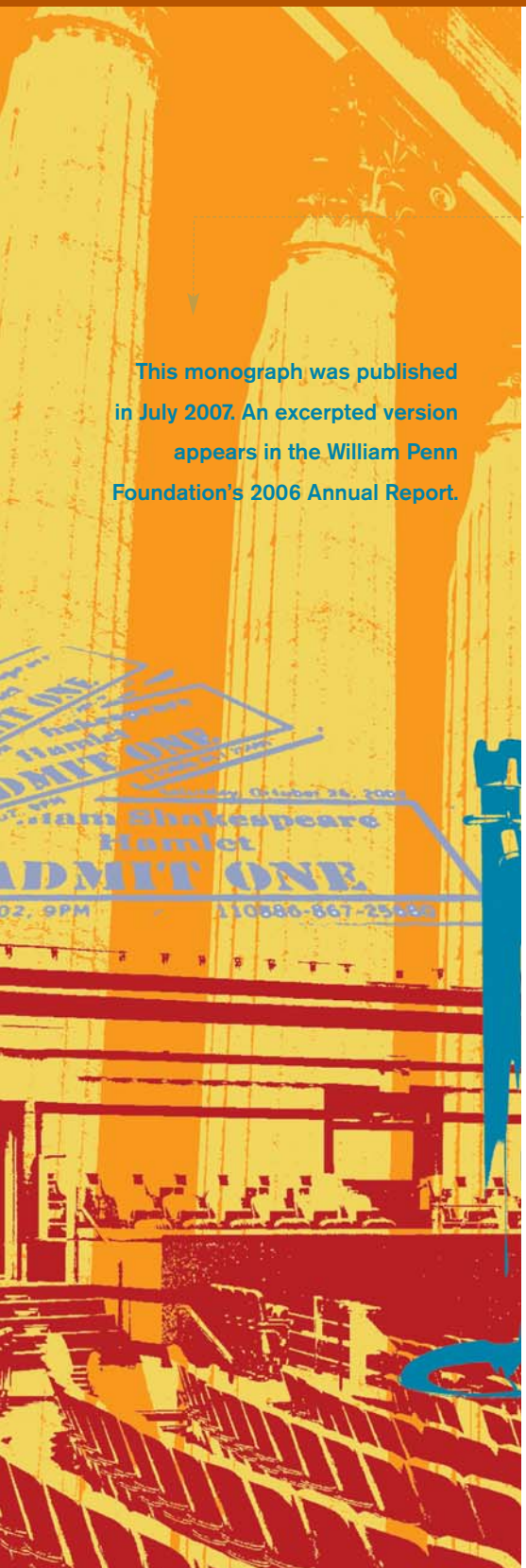

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WILLIAM PENN FOUNDATION

Area Cultural Groups Adjust to Changing Audience Patterns

By Patricia Horn
for the William Penn Foundation

Editor's Note: Greater Philadelphia's cultural consumers have more entertainment choices than ever, creating unique challenges for the organizations that produce, present, and create the wide range of cultural opportunities available in the region. Many cultural organizations in Greater Philadelphia are securing a stronger financial future by reinventing how they interact with their audiences and the public. The William Penn Foundation asked Patricia Horn, a veteran cultural reporter, to explore how several of our Arts & Culture grantees are successfully dealing with these challenges.

The Free Library of Philadelphia faces competition for its audience from bricks-and-mortar bookstores, Amazon.com, video games, Google, NetFlix, public radio, and all of the other things that make people less likely to read books or visit libraries in our society today.

So what makes, or will make, people leave their homes to browse the library's shelves of books, DVDs, databases, and other resources?

"A 21st century library has to be more than coming to get a book, reading it, and returning it," says Elliot Shelkrot, the Free Library's president and director. "We have to make the institution behave in a way that is interactive and stimulates the life of the mind."

The competition the library faces for an audience—from other institutions, from people just sitting at home or going out to other places, from a lack of interest in culture or commitment to attending a library event—is similar to the competition arts and cultural nonprofits face across the Philadelphia region and beyond.

In short, competition is getting fiercer. How should the region's arts and cultural nonprofits respond? How are they responding?

In early 2007, the William Penn Foundation asked about 20 of the region's arts and cultural groups what approaches they were taking, if any, to increased competition. These conversations show that groups are experimenting in a wide variety of ways. For some, these experiments have been ongoing for years.

The gist of what the Foundation heard is this: Reaching today's diverse audiences demands constant experimentation, flexibility, and interactivity. Institutions need to think anew about partnering with other groups and about forging stronger relationships with their audiences. Many audience members want a cultural event to be an "experience" or a destination trip, not just a museum visit or a theater performance.

Consider the library's approach. The library must be a destination people want to visit, online and in person, Shelkrot says. That means providing a sense of community, shared experiences, and the thrill of serendipitous discoveries—like stumbling on the Central Library's extensive collection of antique car repair manuals and advertising, one that ranks among the best in the United States.

Shelkrot points to the library's popular Author/Speaker Series at the Central Library. It illustrates his belief that cultural audiences want to be part of a community and to interact with the artist and the institution. "There is always time for a question-and-answer session. You can buy the book and meet the author," he points out. The series allows for no-guilt flexibility. People can come to one lecture or all, he stresses, and when they come, they feel part of a community audience and build a relationship with the library.

With these factors in mind, the Free Library has planned renovations and a new addition to the Central Library building. "The new building will have soft edges" and feel open and inviting to passers-by, says Shelkrot. "We want to get rid of the sense of restrictiveness that if you don't have a card, you can't come in."

The Central Library also plans to rid itself of other restrictions after its addition and renovations are complete. The Parkway Pavilion will be open from 7 a.m. to 11 p.m. The new building will have glass sides to attract pedestrians and make guests feel connected to the outside. It will have a café, bookstore, banquet area, and a new auditorium. People can bring their coffee into the library's reading rooms *(hurray!),* and there will be a room where teens can hang out and make noise.

Some would say the library is selling out, becoming "Borders-ized". Shelkrot disagrees. "We cannot change the direction of popular culture, but we must be aware of it and sensitive to it and modify what we do and how we do it," he says. "That includes the environment of the library and its services."

One major environmental change arts and cultural nonprofits are tackling is the decline in long-term subscriptions. Arts audiences are becoming increasingly shy of commitment. Using relationship jargon, you might say they are far less interested in getting married or even going steady.

For some groups, the number of subscribers is down overall, or they expect it to drop in the future. For others, the number of subscribers has not fallen, but the number of concerts or events they subscribe to has declined. Most of the groups interviewed are experimenting with new subscription models and offering as much flexibility to potential audience members as possible.

At the start of last season, the Arden Theatre Company saw a precipitous drop in subscriptions and single ticket sales. "That shook us up," Managing Director Amy L. Murphy says. "The message for us was never sit back. We are on the edge of changing times. Never just plug in the routine. The minute you sit back, you get nailed."

The Arden had already planned to add a fourth person to its marketing team—a sizeable number for a theater its size. As Murphy points out, 60 percent of its revenue comes from ticket sales. Ticket sales last year and this year rebounded, and the Arden continues to focus on gaining subscribers. But it has increased its efforts toward group and single ticket sales for each show, doubling group sales in five years.

Murphy does not subscribe to the notion that the aging of the most passionate theatergoers means a future decline in audiences. "I am not of the opinion we should all panic because audiences are dying off," she says. "Audiences are always evolving."

She looks to her own life. She has young children. She does not attend shows as often as she did pre-kids, but she expects to return to her former theater-hopping ways when her children are older. And she expects the same of the children and moms and dads who attend the Arden's children shows. That's one reason the Arden has those shows—to teach children and their parents the wonder of attending live plays.

Lantern Theater Company has bucked the subscriber trend nationwide. This year, it increased its subscribers to 730, partly as a result of a new direction in its annual marketing campaign to create a stronger brand presence for the Lantern.

Even so, the Lantern launched an a la carte ticket package this season. A patron buys four tickets at a discount—tickets they can use any way they want, when they want, whether for four seats at one production, two seats at two, or one seat at four.

The Lantern sold just 50 a la carte subscriptions in its debut year. While that's a small percentage of its overall subscribers, says Karyn Lyman, Lantern's managing director, those buyers bought only single tickets before and she expects that percentage to grow each year. "Theaters will still have their base of traditional subscribers. But with the buying habits we are observing, we need to test new, more flexible packages now," she says.

Like the Lantern, the Philadelphia Shakespeare Festival, the Philadelphia Chamber Music Society, the Philadelphia Orchestra, and others are experimenting with more flexible ticket models.

"Our whole lifestyle today is one of having a flexibility and control over what we choose to do," says J. Edward Cambron, the Orchestra's vice president of marketing and public relations. The Orchestra's current subscription model "does not fit people's lives now."

Orchestra patrons do not want to buy subscriptions forcing them to commit to a particular day, particular seats, and particular performances a year in advance, Cambron says.

Contrary to popular myth, "a lot more people go to the Orchestra than did 20 years ago. A lot more people hear the Philadelphia Orchestra every year," he says. "The problem is those who go don't go as frequently."

Twenty years ago, the average subscriber went to 11 concerts each year, Cambron says. Today, the average subscriber goes to five or six annually.

"People make the choices of what they do very carefully today," he says. "They want to hear what they want to hear. And that puts the pressure on us to make the experience really great."

The Orchestra will move to more of a membership model, one based on how PhillyCarShare works. Patrons would pay a small fee to be members. Among other advantages, that membership would allow them to buy any seats to any concert at any time at a membership rate.

The Chamber Music Society is taking another path: It is sending concert reminders to patrons to help capture those last-minute decision makers and shifting from subscriptions to per-concert reminders. "People are so busy with both parents working," says Philip Maneval, executive director of the Society. "They are very distracted with everything going on."

The Society is also using its email list to make monthly offers (for example, an invitation to attend three concerts during the month) and other specials. It also uses the personal touch: Anyone who calls gets a knowledgeable human answering the phone.

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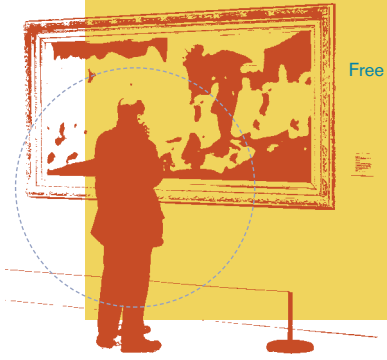
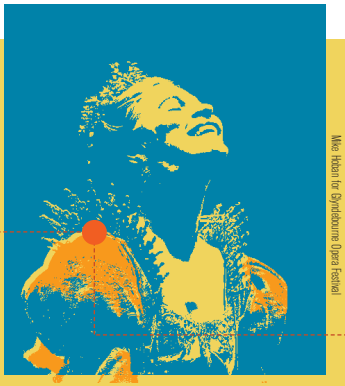
>
> –Elliot Shelkrot, Free Library of Philadelphia



At the Mann Center for the Performing Arts, President Peter B. Lane says his concert venue, which is partially outdoors, must become more adept at handling walkups. "What we are seeing is 'If I am in town, I'll show up and buy tickets,'" he says. "We can have up to 1,000 walkups a show if there is good weather."

These are not just issues for performing arts groups. The Philadelphia Museum of Art has found tickets to its special exhibitions are selling closer to the date of the visit rather than being reserved weeks in advance.

The Greater Philadelphia Cultural Alliance created its once-a-week, half-price email Funsavers to help its members grab last-minute ticket buyers. Funsavers features the gamut of arts and cultural groups, from historic home teas to city walking tours, from major museum exhibits to theater performances. Its offers are in demand: Funsavers now has more than 60,000 subscribers.



Mike Hoban for Glyndebourne Opera Festival

"Our whole lifestyle today is one of having a flexibility and control over what we choose to do."

–J. Edward Cambron, Philadelphia Orchestra

Serving a Niche, Building an Experience

An interesting case in the nonprofit cultural community is the Ambler Theater, a nonprofit movie house in Ambler that opened in 2003. It is part of a consortium of three non-profit movie theaters in the region, which also includes the County Theater in Doylestown and the Bryn Mawr Film Institute.

Moviegoers traditionally are not loyal to a particular theater. They do not buy subscriptions, but instead buy single tickets the very night they go. For theaters, it tends to be a feast-or-famine business, with movies often broken into blockbuster or flop. In this industry, the Ambler faces competition from chains like the Regal and AMC, big corporations with big advertising budgets.

The Ambler, in contrast, caters to a niche audience who want high quality films, foreign films, classic films, serious films, and family films, says John Toner, executive director of the Ambler and County theaters and the managing director of the Bryn Mawr Film Institute.

In effect the Ambler counter-programs to commercial movie theaters. Its building shows the contrast as well. It is a renovated Golden Age theater, a space that adds to the audience experience. The Ambler's programming is also flexible. It can run a film for a week or six weeks.

All three theaters are located in revitalizing downtown areas, not in malls, says Toner. That way people who live in one of the towns can walk to the theater and people who drive can walk to places to eat before or after seeing a film. This builds loyalty to the theater and relationships with other businesses.

"A huge part of our success is that all three theaters are from the classic golden period of film and are in a downtown setting," says Toner. "Many people prefer that to a multi-plex or a mall. The cultural experience is part of the evening. They have dinner and then go to the theater."

And while the Ambler happily sells single tickets, it has focused on building membership, which has increased at a 5 percent to 10 percent rate annually. To grow membership, it offers members a discount on each ticket they buy. It also hosts special events just for members, including meetings with filmmakers and scriptwriters.

The Ambler has a steady audience for its films, and loyalists often wait to see films there even if they open at commercial theaters first.

The Ambler is sometimes just plain lucky. Last year, the film "The Illusionist" "exploded out of nowhere," Toner says. "The Queen" mirrored the success of "The Illusionist," and "The Painted Veil," which did not do as well as expected commercially, did extremely well at the Ambler.

Many Audiences, One Institution

The Philadelphia Museum of Art and the Opera Company of Philadelphia illustrate the balancing act many cultural institutions must juggle: programming for loyal traditionalists as well as for younger, more culturally diverse, and less committed audiences, or in some cases an audience completely new to an art form.

"You don't want to lose your faithful, somewhat older audience," says Anne d'Harnoncourt, director of the Philadelphia Museum of Art. "They are the parents and grandparents of the next generation, and they are really devoted. They make a big difference."

For many years the Museum has held jazz concerts on Friday nights, served meals and alcohol, and welcomed that audience to view its collections. "It has drawn an audience consistently, a wonderful audience," d'Harnoncourt says. "We now can see we get repeat audiences. That is only something you can get over time."

The Museum has extended its Sunday Pay-What-You-Wish program to all day instead of just the morning. That experiment has also worked, drawing an increasingly diverse, younger, and new audience.

What she would like to do, if she had the budget, would be to open the Museum more nights, which other museums around the world are doing, says d'Harnoncourt. "We can't quite afford to do it yet, because we need to be open in the morning for the school kids," she says.

The new Perelman Building, which opens in September 2007, will further show how programming can influence attendance. The Perelman's permanent collections will include photography, modern and contemporary design, and fashion and textile—collections that tend to "appeal to a younger, hipper audience as well as to our traditional audiences," says d'Harnoncourt.

"We've noticed over the years that our photography exhibitions tend to draw a younger audience," Gail Harrity, the Museum's chief operating officer, says. "The audience is very different than those who come to our special painting exhibitions. It was the same with *Best Dressed,* the Elsa Schiapparelli exhibition. It attracted a much broader audience and many that had never come to the Museum before."

The Museum is also rotating more of its permanent art collection. That rotation allows frequent visitors the opportunity to see old favorites and new art, which the Museum hopes will draw more return visitors.

Audiences change, says Harrity. Keeping up "takes a lot of experimentation. Each year a new experiment builds upon the past experiments."

The Opera Company is also testing how to serve audiences with multiple tastes and operatic experiences. The Opera must serve two very different audiences at the same time, says David Devan, managing director. One audience is new to opera, he says, and often younger, multiracial, and open to nontraditional works. The other audience may well have seen 60 operas and have very discriminating operatic tastes, he says.

So this season the opera paired a traditional but artistically sophisticated *La Boheme* with a motorcycle-riding *Cinderella.*

That was true last season when the Opera Company put on a new American opera, *Margaret Garner,* which was based on an actual slave story with libretto by Nobel Laureate writer Toni Morrison and composition by Grammy Award-winner Richard Danielpour. *"Margaret Garner* was an important turning point for the opera in age, demographics, and race," says Devan. "That work was probably the most important thing done in audience development in the last five years."

Buildings and Audience

When the Kimmel Center opened, the Chamber Music Society got its first steady home. It won new audiences and loved its new performance space. "It was the first time we had a hall with its own constituency. Before we had to develop our own audience," says the Society's Maneval.

But it soon found the Kimmel was not enough. Some of its audience preferred its previous venues, so it kept playing in them as well.

It realized other advantages to having multiple spaces. Performing at the American Philosophical Society or the Independence Seaport Museum allows the Society to keep its overall venue costs lower and therefore maintain more affordable ticket prices, a factor for much of its audience, Maneval explains. Smaller performance venues also allow it to host artists still building their reputations, artists who might eventually fill the Kimmel's Perelman Theater.

"We retained flexibility," Maneval says. "We have eight or nine halls."

The Philadelphia Orchestra is exploring playing in other venues as well. It wants to reach more of its suburban audiences who are wary of making the trip to Center City. "People want what they want when they want it," says Cambron. "They are very demanding. They are not always willing to come to the Kimmel."

But with 106 performers, travel is not easy or cheap for the Orchestra. Still, Cambron says, the Orchestra is looking for suburban venues so people can see it perform live.

For some groups, reaching out to where audiences are located is a necessity. Philadelphia does not have a theater devoted to dance. Like many other Philadelphia dance troupes, Headlong Dance Theater does not have a consistent performance space. It must go where invited. "It is a real struggle for us in developing an audience, not having a small dance performance venue," says Amy Smith, Headlong's co-director.

Headlong performs at the Philadelphia Live Arts Festival and DanceBoom!, as well as at events at places such as the Ethical Society of Philadelphia and the Philadelphia Museum of Art.

It has found an audience from these venues. For example, Headlong had stopped doing First Fridays in Old City when it moved to South Philadelphia. But its co-founders felt the company lost something aesthetically and audience-wise when it stopped. "Every month we would have 100 people at two shows," says Smith. "It was a lot of young people and a lot of people new to dance."

So Headlong now rents space in Old City just for First Fridays to continue developing that audience.

Coming Together for a Cause

Relationships: They are hard to build for the long term in a commitment-shy culture.

The Philadelphia Zoo, like many other cultural groups, does not want a member for just one year, says Vikram Dewan, the Zoo's president and chief executive officer. It wants people and families as members for years and years.

One way to do that, Dewan believes, is to connect members with its conservation mission and to help them develop their own conservation tools.

"We see a trend of increased responsible global citizenry," he says. These people want to do their part to preserve the environment and species and seek the tools and education to do that right. The Zoo, he says, wants to be part of that education and long-term commitment.

As an example, Dewan points to the Zoo's plan to create an "ark for frogs," which are rapidly disappearing from the planet. The Zoo will care for and breed frogs and hopes to reintroduce the zoo-bred frogs back into the wild in the future. It also plans to educate its members about the importance of frogs and how the members themselves can help them survive.

The same is true with its upcoming McNeil Avian Center. "We sit in a very important migratory pathway for birds," Dewan says. The Zoo will use the Avian Center to teach its members about birds, migration, and how to help protect threatened species. Zoo staff also hope to show visitors how they can make a difference for birds in their own backyards.

The InterAct Theatre Company is also combining mission and audience in new ways. "We are sort of coming out," says Seth Rozin, InterAct's producing artistic director. "We are a socially and politically oriented theater."

While always leaning in that direction, the theater's board has made a conscious decision to market itself that way now and to focus on attracting a like-minded audience.

Part of the impetus for this move by InterAct, says Rozin, is that Philadelphia has a relatively small group of very active theatergoers, many of whom subscribe to multiple theaters. "Those of us in the established theater scene have been cannibalizing that group for a long time and try to win them back and forth from each other," he says. In the end, the InterAct sees that as a no-win tactic.

Instead of fighting for that group every year, InterAct wants to build its own loyal core. To do that it surveyed its members about their backgrounds and interests and has intentionally cultivated relationships with the leadership and members of the American Civil Liberties Union (ACLU) and Amnesty International, two groups to which many of its most loyal members belong.

When Amnesty had an event centered on Guantanamo Bay prisoners, InterAct provided an actor to read at the event. InterAct then worked with Amnesty to promote its play "Kiss of the Spider Woman," which examines human rights in Argentina.

"We need to build a really solid audience. Then we will be ready to branch out to people who aren't as likely to attend us," says Rozin. "We are trying to grow from the ground up. We do not see this as short-term fix. It takes time. This will happen over years and not over one season."

"We need to make people feel comfortable trying something new and expanding their cultural menu."

–Peggy Amsterdam, Greater Philadelphia Cultural Alliance

Partnerships such as InterAct's with Amnesty and the ACLU are more and more part of audience development. When the Philadelphia Museum of Art hosted the Degas exhibit, it invited 80 dance groups to perform and attend the exhibit. "Some of them were really tiny groups, but this pulled people into the Museum for the first time," Harrity says.

The Museum partnered with the Brandywine River Museum for the Wyeth exhibit, which helped it reach a more suburban audience. For the *Tesoros/Treasures/Tesouros: The Arts in Latin America, 1492–1820* exhibit, it reached out to Latino groups.

The Zoo "sees a huge synergy with the Smith Memorial Trust and the Please Touch Museum" after the Museum moves to the new Centennial District in West Philadelphia, says Dewan. That synergy will include transportation between the three groups, which he hopes will be operating when Please Touch opens its new home in 2008.

Comfort Zone

One of the biggest tasks for arts and cultural nonprofits is making people feel comfortable walking into a ballet or an opera or a science museum for the first time, says Greater Philadelphia Cultural Alliance President Peggy Amsterdam. The next task is encouraging them to try additional cultural experiences, such as a chamber music concert. "We need to make people feel comfortable trying something new and expanding their cultural menu," she says.

The traditional cultural sector is paying the price of many schools cutting back on arts programs for what are now multiple generations. Adam Travia, the director of marketing for The Philadelphia Shakespeare Festival, says that at some of the festival's student performances this year "half the audience had not even been to a play before."

Making all types of people feel comfortable can mean changes large and small. The huge resurgence in opera attendance in the 1990s can be partly traced to the use of supertitles to translate operatic text so people could understand the stories, according to the Orchestra's Cambron. Audio guides with art exhibitions have proven great learning tools for many attendees, he says.

Like other groups, the Orchestra is experimenting with how to make audience members new to classical music comfortable at their first performances and eager to return.

The Orchestra, Cambron says, must help audiences unfamiliar with classical music learn the "stories" behind the music and how to interpret a musical piece. To not do that, he says, is akin to asking a movie audience to watch a film in a foreign language without the subtitles to help.

The Orchestra is planning to experiment with how to do that at its Access Concerts. This year it will start using camera technologies to show close-ups of musicians and develop methods to give audiences additional content to help understand the orchestral work.

"We won't roll this out at every concert, because not every audience would want it," he says. "But for younger audiences, they may want and need that."

Removing the wall between the artist and the audience is one of Peter Lane's goals at the Mann. Another is to throw out the unwritten rule books.

Part of an ongoing $50 million renovation of the Mann is a reception area where some audience members can meet visiting artists, which is one way to connect performers on the stage and the audience on the lawn. Another way is to have a member of the Philadelphia Orchestra, during a summer performance at the Mann, stand up to introduce a piece and say what draws him or her to that musical work.

"People want to know they can connect with someone on the stage. They want to feel the arts are approachable," he says. "There are so many rules around when to clap and when to stand, people feel intimidated. And why go if you feel intimidated? I'm trying to lose the barriers and make art so much more approachable. Come, have a glass of wine, gather with friends, and listen."

Patricia Horn is a former reporter for *The Philadelphia Inquirer,* where she won three statewide awards for her business coverage. In her last beat at the *Inquirer,* she covered the business of the arts. Horn has also written for *The Baltimore Sun*, *The Christian Science Monitor, The Fort Lauderdale* (FL) *Sun-Sentinel,* and *The Sarasota* (FL) *Herald-Tribune.*

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